

## SOAR Online Course - Practice Case Guide

Use this checklist to track your Practice Case tasks.

### Practice Case 1: Meet Your Client

- Gather information:* View the applicant interview video (this is the first of three segments).
- Download and save to your computer:* Five SSA forms; Medical Summary Report (MSR) Interview Guide & Template. Use this tool to help guide you as you gather information about the applicant and write your MSR.

### Practice Case 2: Complete the SSA-827 and SSA-1696

- Gather information:* View the second segment of the applicant interview video; read progress notes provided.
- Upload completed SSA Forms to your Practice Case Application Packet:*
  - a. SSA-1696: Appointment of Representative
  - b. SSA-827: Authorization to Disclose Information to SSA

### Practice Case 3: Collect and Review Medical Records

- Gather information:* View the last segment of the applicant interview video; read progress notes and medical records provided.
- MSR:* Begin writing the Personal History section.
- SSA Forms:* Download and begin the SSA-8000: SSI application and SSA-16: SSDI application.

### Practice Case 4: Complete the SSI/SSDI Applications

- Gather information:* Read medical records provided; review previous videos as needed.
- MSR:* Complete the Personal History, Physical Health and Psychiatric History, and Occupational History sections.
- SSA Forms:* Download and begin the SSA-3368: Adult Disability Report.
- Upload completed SSA Forms to your Practice Case Application Packet:*
  - a. SSA-8000: SSI application
  - b. SSA-16: SSDI application

### Practice Case 5: Complete the Disability Report

- No new information provided* – review previous videos as needed.
- MSR:* Complete the Functional Areas.
- Upload completed SSA Forms to your Practice Case Application Packet:*
  - a. SSA-3368: Adult Disability Report

### Practice Case 6: Complete the MSR

- No new information provided* – review previous videos as needed.
- MSR:* Upload completed MSR to your Practice Case Application Packet.

### Practice Case 7: Submit Application

- Click **Submit your Application Packet and Complete the Course!**
- You will receive a confirmation e-mail that your packet has been submitted for review.